9.5. Conversion Uploads

10/29/2024 4:34 pm CDT

Conversion Uploads are accessed from the Compliance Menu, under "Tools/Settings".

Home > Edit Co	mpany > Edit Plan > Compliance > Tasks			Updates He
Common	Tort Company		Compliance Menu	
Company:	Demo Plan		< Census	
Plan;	Volume Submittee 401/b) (Prototure Sermet), SCI004		Tasks	
Detaile: EIN: 12-3456111 + DN: 001 + DVE: December 31			< Transactions	
Vear End:	12/31/2013		Miscellaneous	
Compliance Tasks - Expand All Applicable / Expand All / Collapse All		Clone	< Tools/Settings	
		Workflow	Plan Specifications	
		Print Setting Global Participant Search		Print Package 💌 👻
Scrub/Eligibility		Conversion Uploads	Run: 🕥	Reports: 💽
Allocation		History Uploads	Run: 🛕	Reports:
Combined Test		Debug Copy to test5500-04	Run: 📐	Reports:
ADP/ACP Test			Run: 📐	Reports:
-	1.00		a	Demostry (

The options "Map DC Sources" and "DC Windows" are for upload of Datair participant information and end of year balances. You first need to click "Map DC Sources" and enter the two digit codes for each Datair source according to the appropriate ftwilliam source, indication where it should be mapped. Once you have done that you can click on "DC Windows" and upload your Datair file.

The options "Create DER Template" and "Upload DER" are for importing data from Relius. You will first need to click "Create DER Template"; this will open a Microsoft Excel spreadsheet formatted for entering data from the Relius system. You can then downloaded your data and enter it into the spreadsheet and save the spreadsheet as a .csv file. Next you would upload it using the "Upload DER" link.

